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Australian Government

Department of Education, Employment and Workplace Relations

AUMANA3001 Prepare and document quotation

Release: 1

AUMANA3001 Prepare and document quotation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the application of the required skills and knowledge to prepare a job quotation for a customer. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.
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Application of the Unit

Application of the unit	The unit applies to the automotive and related component manufacturing environment and involves application of skills and knowledge to be used within the scope of the person's job and authority.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills	This unit contains Employability Skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the required performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine customer requirements	1.1. Customer product requirements are established and project parameters specified in accordance with <i>organisation requirements</i> 1.2. Customer requirements are compared with existing organisation products 1.3. Product variations required by the customer are established 1.4. Customer purchase and payment arrangements are negotiated
2. Estimate job labour, parts and material requirements	2.1. Variations from standard organisation product are estimated 2.2. Additional processes, parts and skills required to meet customer requirements are estimated 2.3. Draft project brief established for costing 2.4. Job schedule and material list is prepared
3. Cost the job	3.1. Organisation job costing procedures, including <i>cost reduction initiatives</i> , are employed to determine job budget 3.2. Estimated materials, labour and equipment costs are totalled for the job 3.3. Estimations for contingencies and <i>changed work requirements</i> are included in the total budget 3.4. Job and budget requirements are included in organisation production schedules
4. Document and confirm quote	4.1. Quotation is prepared in accordance with organisation requirements 4.2. Quotation provided reflects customer requirements 4.3. Changes and variations are negotiated to meet customer and organisation needs 4.4. Organisation records/customer file is created for the job

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level, required for this unit.

Required skills

- speak clearly and directly in order to negotiate customer paying arrangements
- apply teamwork to a range of situations, including the estimation of the job schedule
- solve problems particularly in teams in order to meet performance indicators
- show initiative in adapting to changing work conditions or contexts particularly when working across a variety of work areas
- access, interpret and apply information on relevant organisation policies, procedures and instructions, particularly to ensure quote is prepared in accordance with organisation requirements
- manage time when planning, preparing and organising work priorities
- take responsibility for organising own work priorities.

Required knowledge

- relevant Occupational Health and Safety and Environmental regulations and organisation policies and procedures needed to carry out work in a manner which ensures the safety of people, equipment and the environment.
- technical work documentation covering procedures, specifications, schedules and work plans or equivalent
- cost minimisation/waste avoidance policies, procedures and practices
- environmental protection requirements relating to the disposal of waste material
- established communication channels and protocols
- problem identification and resolution techniques
- computer applications relating to estimation and costing
- labour rates for job schedule
- procedures for planning and estimating a job
- customer contact and negotiation skills
- organisation OHS procedures and policies
- organisation quotation production flow chart.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- compliance with relevant legislative, regulations, standards, codes of practice and establish safe practices and organisation policies and procedures for managing personal work priorities
- maintaining a working knowledge of current work systems and practices
- working and communicating effectively and positively with others involved in the work
- applying, within authority, the requirements of the job or work role in relation to:
 - achieving production goals
 - achieving work quality goals
 - responding positively to changing work requirements
 - contributing effectively to cost reduction initiatives
 - effectively applying problem solving techniques
 - modify activities to cater for variations in organisation context and environment
- preparation of detailed estimates of labour, parts and equipment
- completion of detailed quote
- calculation and allowance for contingencies
- maintain organisation records - paper based / electronic.

Context of and specific resources for assessment

- assessment of the competency should take place in a safe working environment in a passenger motor vehicle manufacturing plant or simulated environment using tools/equipment/machinery required for the production process without undue disruption to the production process
- assessment is to occur under standard and authorised work practices, safety requirements and environmental constraints.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- assessment methods must confirm consistency and accuracy of performance (over time and in a range of organisation relevant contexts) together with application of underpinning knowledge

EVIDENCE GUIDE

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| | <ul style="list-style-type: none">• assessment methods must be by direct observation of tasks and include questioning on underpinning knowledge to ensure its correct interpretation and application• assessment may be applied under project related conditions (real or simulated) and require evidence of process• assessment must confirm a reasonable inference that competency is able not only to be satisfied under the particular circumstance, but is able to be transferred to other circumstances. |
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Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording in the Performance Criteria is detailed below. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Organisation requirements
may include:

- access and equity principles and practices
- environmental management (waste disposal, recycling and re-use guidelines)
- emergency and evacuation procedures
- equipment use procedures
- ethical standards
- legal obligations
- maintenance and storage procedures
- OHS requirements
- organisational and site guidelines
- policies and procedures relating to own role and responsibility
- procedural manuals
- quality assurance guidelines
- quality and continuous improvement processes and standards
- recording and reporting guidelines.

Cost reduction initiatives
may include:

- continuous improvement programs
- cost benchmarks
- power conservation
- productivity achievement
- waste avoidance.

Changed work requirements
may include:

- interruptions to parts supply/quality
- line speed
- personnel absences and the needing to fill production line gaps.

Unit Sector(s)

Unit sector	Loss Assessment or Repair Quoting
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Competency field

Competency field	Manufacturing - Common
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Co-requisite units

Not applicable.